



# STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

**Working Title**

Collections Research Technician

**Job Code Title**

Auditing Technician

**Pay Band**

3c (Administrative Assistant III)

**Job Code Number**

433333

**Business and Income Taxes Division**

Accounts Receivable and Collections Bureau

**Fair Labor Standards Act**

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Business and Income Taxes Division is responsible for the administration, auditing, compliance, and collection activities for approximately 30 tax types and the appraisal and assessment of industrial and centrally assessed property. Tax types include corporation income, individual income, withholding, combined oil and gas, coal severance, other natural resource taxes, cigarette, retail telecommunications, lodging facilities, and miscellaneous taxes. The division includes the Administrative Team, Accounts Receivable and Collections Bureau, Business Tax and Valuation Bureau, and the Income and Withholding Tax Bureau. The Accounts Receivable and Collections Bureau is responsible for the daily management of accounts receivable and collections. Services include establishing taxpayer payment plans, legal collection activity, phone collections, and management of the state's bad debt program.

**Job Responsibilities**

A Collections Research Technician provides data review, research, and report services to support tax collection and enforcement activities. This includes locating, verifying, and reporting tax-related information and overall collection and enforcement data. The incumbent researches multiple databases to provide information needed to coordinate tax collection activities for delinquent accounts; reviews documents and other data sources; and provides a range of general administrative support services. The position reports to a unit manager and does not supervise other staff.

**• Collections Support 90%**

1. Reviews and verifies technical and legal documents including docketed warrants, liens, probate claims, collection activity reports, and others to ensure accuracy and completeness. Identifies and resolves basic errors and omissions. Contacts the person who originated the document to resolve significant issues.
2. Researches and compiles personal and real property and taxpayer information from databases to generate automated reports and reports of customized searches based on individual requests.
3. Researches and compiles data from federal, state, municipal, and private agency records to assist with tracing activities and investigations of taxpayer records.
4. Examines technical reports to identify problems with data quality, formats, computations, and other issues.

5. Reviews, verifies, and records information from forms, reports, correspondence, and other sources to maintain records of collection and enforcement actions.
  6. Tracks taxpayer contacts and issues, information sources, and responses to taxpayer inquiries to ensure consistent responses to issues and identify recurring problems such as spikes in questions related to new forms.
  7. Initiates probate claims with the courts to file the department's debt claim against the estate of deceased taxpayers who owe delinquent tax debts to the State of Montana.
- **Administrative Support 5%**
    1. Researches and compiles general program information to ensure courteous and efficient responses to inquiries and requests for assistance. Refers unusual or specialized requests to appropriate program staff and managers.
    2. Sets up and maintains electronic and manual records systems to ensure accuracy, accessibility, and security of information. Compiles and stores relevant data in databases or files. Provides records as requested. Coordinates records retention and disposal procedures in compliance with applicable requirements.
    3. Compiles report and query data. Develops spreadsheets to assist management in tracking collection activities.
    4. Develops and maintains tools for recording, tracking, and reporting operational and program information such as forms, templates, and references.
    5. Identifies office supply and equipment needs, prepares supply orders, and maintains supplies according to established purchasing and requisition policies and procedures. Tracks office supplies to identify immediate needs and anticipate future needs; orders necessary supplies and equipment; and tracks purchasing records.
    6. Performs administrative tasks such as receiving and routing incoming and outgoing mail and arranging for typesetting, mailing, and data entry.
  - **Other Duties as Assigned 5%**
    1. Performs other duties as assigned by the supervisor.

### **Job Requirements**

To perform successfully as a collection research technician, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. It is essential that incumbent has the ability to concentrate and reason deductively and inductively. Skills in multi-tasking; paying attention to details and accuracy; managing multiple priorities under tight deadlines; mathematics; providing timely and effective written, verbal, and interpersonal communication; customer service; researching and analyzing documents and other data sources; assessing individual taxpayer information; and word processing, spreadsheet, and database applications are required. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires knowledge of tax collection methods and procedures; basic research techniques and standard sources of information; database and search engine operations; records maintenance procedures; and standard office procedures.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a high school diploma or GED and two years of job-related work experience.
  - Work experience should be made up of financial or credit services, researching data, and using databases. Training in searching databases and using spreadsheet software preferred.
  - Other combinations of education and experience will be evaluated on an individual basis.

### **Department Core Values**

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as

equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.

- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

### **Working Conditions**

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. Some situations encountered may be stressful due to nature of customer contacts. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

### **Special requirements**

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

**This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.**

**Division Administrator Review:** The statements in this job profile are accurate and complete.

Signature: Gene Walborn, Division Administrator Date: August 2010

**Human Resource Director Review:** The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

**Employee:** My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Name (print): \_\_\_\_\_